



**SHAWNEE MISSION
SCHOOL DISTRICT**

Contact information:

Shawnee Mission School District
Purchasing Department
8200 W. 71st Street
Shawnee Mission, Kansas 66204

ATTN: Reed Beebe

**Please note that vendors may request a copy of
this RFI in Word format by emailing
purchasing@smsd.org.**

DATE: March 28, 2024 RFI NO. 24-009

RFI TITLE: **HVAC Maintenance Services**

Responses will be accepted until:

Date: **April 18, 2024**

Day: **Thursday**

Time: **11:00 a.m. CST**

**Terms, conditions, and specifications under which
responses are requested are included. Please review
thoroughly.**

Introduction:

The Shawnee Mission School District (“the District”) requests a written response to this Request for Information (“RFI”) for the purpose of obtaining information from qualified vendors interested in providing heating, ventilation, and air conditioning (“HVAC”) maintenance services capable of meeting the District’s needs.

This is a request for information only; this RFI is issued by the District solely for its information and planning purposes, and the RFI does not commit the District to contract for any supplies or services whatsoever.

The District, at this time, is not seeking detailed proposals that outline specific pricing and terms and conditions, but the District intends to follow-up with selected vendor(s) that offer services that are of interest to the District, with possible subsequent negotiation of a multi-year contract with the desired vendor(s).

All RFI responses shall be delivered, and shall adhere to the format, as further indicated herein. The District shall have the right to ask additional questions of – or request additional information from – responding vendors. The responses may, upon review by District staff, result in a qualified list of vendors for the products and services requested in this RFI; should this occur, finalists will be notified, and formal proposals will be requested that include specific pricing and other terms and conditions for the District’s consideration.

This RFI includes an overview of the District's HVAC maintenance needs. Due to the number of District HVAC equipment units and components distributed across various locations, the District currently would prefer not to share detailed HVAC equipment lists through this RFI process, but would make such information available later to vendors selected for additional discussions/negotiations through the RFI process.

Overview:

The Shawnee Mission School District is located in suburban northeast Johnson County, Kansas, ten miles from downtown Kansas City, Missouri. The District is the third largest school district in the state of Kansas and is dedicated to guiding students to success.

The District has over fifty-eight (58) buildings utilizing various HVAC equipment. The District has its own staff that provide routine HVAC maintenance, but staffing challenges have prompted the District to consider contracting with a vendor to provide HVAC maintenance services as needed, to supplement the ongoing staff work.

Desired Services:

The District currently desires the following HVAC maintenance services:

- The ability to provide as-needed, day-to-day HVAC repair and maintenance services
- The ability to provide skilled and knowledgeable technicians for the repair of boiler and chiller systems, (air-cooled and water-cooled) RTU's, split system DX cooling units, heat pump equipment, unit ventilators, AHU's with VAV and/or multi-zone distribution sources, pneumatic and electronic controls with automated building management and energy management systems
- The ability to furnish labor, equipment, tools, supplies, and materials required for the maintenance of HVAC equipment throughout the District
- The ability to install and repair equipment and systems according to the respective manufacturer's specifications, service manuals, industry, federal, state, and local codes, regulations, and any applicable terms, conditions, provisions, and schedules that may be negotiated in a final contract
- The ability to bill the District on a monthly basis, providing detailed billing information (dates worked, services provided, etc.)

Services shall be provided on an as-needed basis. Service should consist of both repairs and installation, and whenever called or scheduled by authorized customer personnel. Service should be billed and recorded by the hour, per day, with a weekly tabulation that will be billed monthly. The District's regular hours are 7:00 am to 3:30 pm (Monday – Friday). The selected vendor must be prepared and

equipped to perform maintenance and repair tasks during the desired pre-approved work time frame.

In response to any service call, the selected vendor will report to designated District staff upon arrival at the site to identify tasks and locations where the work will be performed per day. Site location will depend on the work schedule and pre-determined workload of equipment breakdown at any given location with District locations. Upon completion of work (or departure from the premises), a detailed electronic work order must be presented to designated District staff.

Any emergency calls before or after normal District operating hours must be approved by designated District staff.

The selected vendor's staff must be able to pass a background check performed on the District's RAPTOR system, in order to work on school property. (For context, RAPTOR is a visitor registration system that enhances school security by reading visitors' government-issued photo identification, comparing this information to a national sex offender database; if no match is found, the District prints a visitor badge to be worn while on school grounds. Additional vendor data is not gathered or shared with any outside company or organization.)

Desired Billing Process:

Any agreed-upon services shall be accumulated, provided, and billed monthly. Pre-determined workdays will be scheduled with the District and will be monitored with weekly work hour reports, agreed upon by designated District staff (which would likely be the District's Assistant Director of Facilities, Utility Shop Forman, and Lead HVAC Technician). The selected contractor shall keep electronic maintenance records with the District's electronic work order system (currently, School Dude), or turned into designated District staff for reporting logs that will be inputted into School Dude. All service and/or repairs shall be recorded to include the date and the specific tasks performed. All records shall be available for review and/or inspection during any normal workday by authorized District staff.

Any needed service repairs, parts, and equipment that may need to be furnished outside of any agreed upon contract will be quoted based upon time and material as "Not-to-Exceed." The District must approve any such work prior to it being performed by the selected vendor, and any miscellaneous fees for equipment use, rental, and sub-contracts must be pre-approved by the District.

Desired Part Order Process:

Any part orders should be coordinated through designated District staff. The District has a parts warehouse, and has the ability to stock and order items through vendors that have been authorized by the District. If parts cannot be supplied by the District's parts warehouse team, proper coordination of needed parts or supplies will need to be approved through qualified employees and/or distributors. Any other items will need to be approved by the District before ordering and billed to the District as a "Not-to-Exceed" circumstance.

Desired Budget and Implementation Timeframe:

The District currently has established no firm budget for the HVAC maintenance services outlined in this RFI, with costs contingent upon as-needed services and parts. However, at this time the District is interested in gauging general cost ranges (hourly rates, trip charges, and parts and material multipliers). The District currently anticipates that work with a selected vendor would commence by July 1, 2024.

RFI Response Requirements:

Submitted responses should be limited to the sections and items identified below. The capacity of the respondent to make a complete and responsive presentation will be favorably considered.

Submittals should contain the following items:

- A. **Letter of Interest:** Provide a brief letter expressing the respondent's interest and appropriate qualifications. The letter of interest should include the following information:
 - Title of this RFI ("**RFI 24-009: HVAC Maintenance Services**");
 - Name and mailing address of respondent (including physical location, if mailing address is a P.O. Box);
 - Contact person, telephone number, and email.

- B. **Completion of Exhibit A Questionnaire:** Respond to the questions listed in **Exhibit A**. Please note that a Word copy of this RFI, including Exhibit A, can be requested by emailing purchasing@smsd.org.

- C. **Completion of Exhibit B Checklist:** Please check "Yes" or "No" regarding your firm's ability to provide the desired services listed in the provided checklist. You may also use this checklist to clarify or provide additional information regarding your firm's ability to provide services that addresses the District's desired services. Please note that a Word copy of this RFI, including Exhibit B, can be requested by emailing purchasing@smsd.org.

- D. **References:** Provide three (3) references for similar services provided within the last five (5) years, to institutions of similar size and needs to the District. Provide

a brief description of the services provided. If a vendor is selected for subsequent negotiations, the vendor will be asked to provide specific reference contact names, addresses, and telephone numbers that can provide feedback on the proposed products and services.

Response Submittal Instructions:

Responses shall be submitted no later than the time and date indicated herein. Responses submitted to a location or individual other than that listed below will not be considered duly delivered or timely. The District shall not be responsible for re-routing responses delivered to a person or location other than that specified below. Late response submittals shall not be accepted or considered. All responses, whether accepted or rejected, shall become the property of the District and will not be returned. The District reserves the right to waive minor defects and/or irregularities in response submittals and shall be the sole judge of the materiality of any such defect or irregularity. The District reserves the right to seek additional responses if the received responses are deemed unsatisfactory. All costs associated with response preparation shall be borne by the respondent.

Responses may be submitted in hardcopy format (one physical copy) to the “**Official Contact**” address listed in this RFI, and shall be received by delivery in person or via service (US Mail, UPS, FedEx, etc.) in a sealed envelope or box. Electronic delivery (i.e., email) will not be accepted.

All responses must be received no later than **11:00 a.m. CST, Thursday, April 18, 2024**, and should be clearly marked “**RFI 24-009 – HVAC Maintenance Services.**”

Please note that vendors may request a copy of this RFI in Word format by emailing purchasing@smsd.org.

Official Contact/Deadline for Questions:

Additional feedback or questions may be addressed by the official contact below:

Reed Beebe
Shawnee Mission School District
8200 W. 71st Street
Shawnee Mission, KS 66204
913-993-6475
purchasing@smsd.org

All questions concerning this RFI must be received no later than **Tuesday, April 9, 2024 by 4:00 p.m. CST**. The District will address questions via addenda (see “**Addenda/Cancellation**” below); it is currently anticipated that any applicable addenda will be issued by **Wednesday, April 10, 2024 by 4:00 p.m. CST**.

Response and Response Evaluation Availability:

To the extent allowed by the laws of the State of Kansas, including the Kansas Open Records Act (K.S.A. 45-215 *et seq.*), responses received by the District will not be open to public review, nor disclosed to unauthorized persons, prior to award of a contract (or a decision by the District not to award a contract) for the services listed in the RFI. Likewise, the District's evaluation documentation of the received responses will not be open to public review nor disclosed to unauthorized persons, prior to award of a contract/decision not to award. Thereafter, all responses and related evaluation documentation shall be open to public inspection.

Addenda/Cancellation:

The District may modify or cancel this RFI at any time prior to the RFI due date by issuance of an Addendum or Cancellation. Such Addenda and/or Cancellations will be posted on the District's website, currently: **smsd.org (Go to About; Department Teams; Purchasing & Bidding; Bids & Bid Summaries View Page.**

Selection Criteria:

After the District's initial review of submitted responses, the District intends to choose one (1) to three (3) highly qualified vendors considered best qualified and capable of providing/performing the desired products/services outlined in this RFI and, if desired, request interviews or discussions with select vendors; the District may attempt further negotiation with the goal of executing a final contract with the selected vendor(s). However, the District reserves the right not to make a contract award, to make a partial contract award, or to make a multiple vendor contract award, at its sole discretion, through this RFI process.

The following criteria will be used by the District to evaluate the RFI responses:

- The response's adequacy in providing the desired information outlined in this RFI (10 points);
- The respondent's qualifications, including education, training, licenses, experience, and past performance of the respondent's agents, employees, and (if applicable) sub-contractors (20 points);
- The desirability to the District of the typical pricing information in relation to the District's needs (25 points);
- The respondent's ability to provide the desired services outlined in the RFI (25 points)
- The respondent's ability to accommodate the desired billing process outlined in this RFI (20 points).

Confidentiality of Respondent Information:

The District is a state agency, and information submitted to the District in response to District solicitations for product or service information is generally a public record. Accordingly, no response shall restrict the District's ability to produce the solicitation

response and/or any corresponding documents in response to a lawful request or from otherwise complying with the Kansas Open Records Act (K.S.A. 45-215 *et seq.*)

Confidentiality of District Information:

Respondent acknowledges that any information provided by or obtained from the District in connection with this RFI is the sole property of the District and must be treated as confidential, and that this confidential information is not to be used for any purpose other than replying to this RFI, and that this confidential information must not be disclosed without the prior written authorization of the District, and, if applicable, that this confidential information must be returned to the District immediately upon the request of the District.

Pricing/Cost Model Information for General Information Purposes

Only:

Any pricing/cost model information provided by respondents is for general information purposes and is not intended to be binding on respondents. Any legally binding pricing or purchasing commitments will be established only when specified by the express terms of a subsequent bid or negotiation process, or where established through the execution of a written agreement.

The District understands that specific pricing will be determined by the products and services selected by the District, and at this time the District is interested in information regarding general pricing structure options and general cost ranges, not a finalized price quote.

Information in RFI Only an Estimate:

The District and its representatives make no representations, warranty, or guarantee as to the accuracy of the information contained in the RFI or issued via addenda. Any quantities or data contained in this RFI or related addenda are good-faith estimates provided only as general background information.

Governing Law:

It is understood and agreed that the construction and interpretation of this RFI and related addenda shall be governed by the laws of the State of Kansas.

EXHIBIT A: QUESTIONNAIRE

Please respond to the questions below; a Word copy of the RFI, including Exhibit A, can be requested by emailing purchasing@smsd.org. In addition to completing this questionnaire, please provide a letter of interest and references, along with completing Exhibit B, as outlined on page 4 of this RFI.

1. Please discuss your firm's qualifications; specifically, please provide a general overview of your staff's applicable education, training, licenses, experience and past performance. Please include information regarding your firm's years of operation and service to institutions of similar size and needs to the District, as well as general information about your staffing size.
2. Please discuss your firm's ability to meet the desired billing process outlined in this RFI. Would your firm be able to provide weekly work hour reports for requested service, and bill the District on a monthly schedule?
3. Please discuss your firm's flexibility in providing as-needed, day-to-day services to the District. What is your firm's typical response time to a service request from a client?
4. As noted in the RFI, the District will be sourcing most parts and materials through its parts warehouse. However, in the event that parts need to be sourced through your firm, please discuss your sourcing process for such parts. What on-hand inventory levels does your firm offer to ensure minimum wait times for acquiring needed parts and materials?
5. The District understands that final costs for services and materials are contingent upon final products and services selected by the District, and the District is not seeking a formal or binding quote at this time. However, based on the District's needs as identified in this RFI, the District would appreciate your firm's typical pricing information for the following price schedules:
 - Service Technician Hourly Rate (Monday – Friday, 7:00 am to 3:30 pm):
\$_____
 - Service Technician Weekly Rate (Monday – Friday, 40 hours total)
\$_____
 - Trip/Truck Charge \$_____
 - Parts/Materials Resale Mark-up Multiplier \$_____
6. Is there any additional information about the capabilities of your firm's ability to meet the needs of the District, not addressed in the questions above or in the District's checklist of desired services, that you would like to share? You are welcome to submit any additional information materials (brochures, online links, etc.) that you think may be of interest to the District.

EXHIBIT B: DESIRED SERVICES CHECKLIST

Please check “Yes” or “No” regarding your firm’s ability to provide the desired HVAC maintenance services listed below; a Word copy of the RFI, including Exhibit B, can be requested by emailing purchasing@smsd.org. In addition to completing this questionnaire, please provide a letter of interest and references, along with completing Exhibit A, as outlined on page 4 of this RFI. **NOTE: The District understands that some firms may not be able to provide all of the desired services listed below, and the inability of a firm to provide all desired features is not automatically disqualifying for consideration.** The checklist below is meant to help District staff gauge which desired services may be available from a vendor.

Desired Services	Yes	No
The ability to provide day-to-day HVAC repair and maintenance services		
The ability to provide skilled and knowledgeable technicians for the repair of boiler and chiller systems, (air-cooled and water-cooled) RTU’s, split system DX cooling units, heat pump equipment, unit ventilators, AHU’s with VAV and/or multi-zone distribution sources, pneumatic and electronic controls with automated building management and energy management systems		
The ability to furnish labor, equipment, tools, supplies, and materials required for the maintenance of HVAC equipment throughout the District		
The ability to install and repair equipment and systems according to the respective manufacturer's specifications, service manuals, industry, federal, state, and local codes, regulations, and any applicable terms, conditions, provisions, and schedules that may be negotiated in a final contract		
The ability to bill the District on a monthly basis, providing detailed billing information (dates worked, services provided, etc.)		

CLARIFICATIONS -- If you would like to clarify or provide additional information regarding your firm’s ability to provide services that addresses the District’s needs, you may do so below: